

your
appraisal
& check in

My Pages

Dashboard

ESR Navigator

Talent Profile

Org

M

I

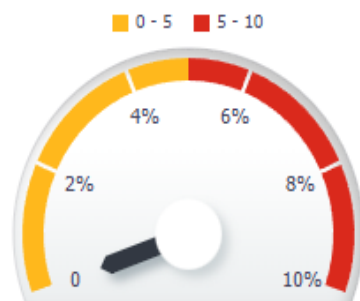
M

My

Inf

Team Absence

Team Absence



Sickness: 0.00%

Refresh - Print - Export

Manage Absence

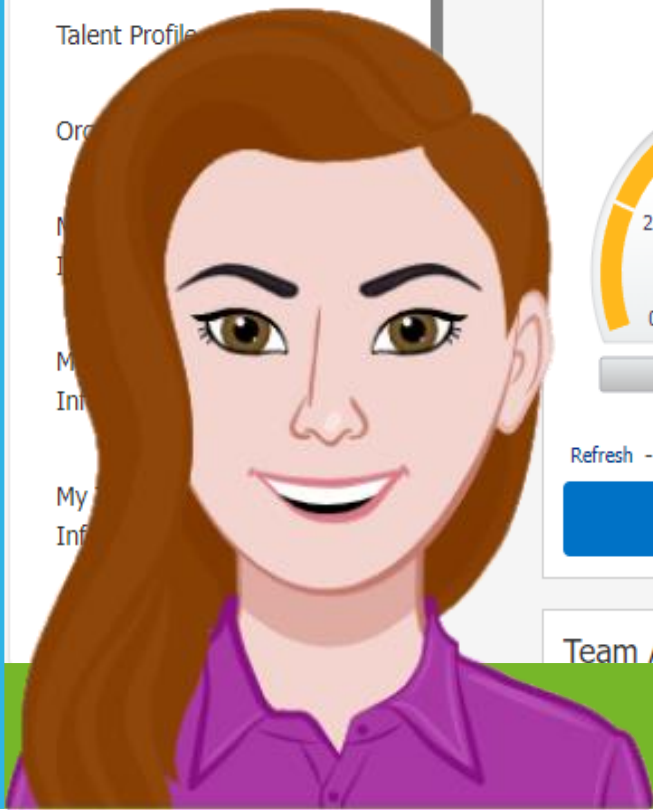
Appraisals & Check In's

your
appraisal
& **check in**

ESR Completion Guidance

**Recording Appraisal and
Check In**

Team Actions



Hi, I'm Michelle.

I'm going to show you how to enter Appraisals and Check Ins on ESR.

First, go to your Manager Dashboard.

My Pages

Dashboard

ESR Navigator

Talent Profile

Orga

M

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M

Inf

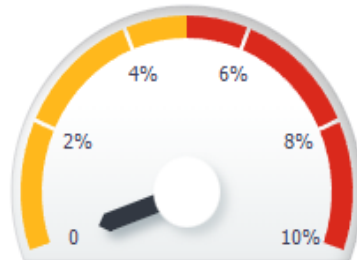
My T

Inf

Team Absence

Team Absence

0 - 5 5 - 10



Sickness: 0.00%

Refresh - Print - Export

Manage Absence

Team Actions

Appraisals & Check In's

your
appraisal
& **check in**

ESR Completion Guidance

**Recording Appraisal and
Check In**



You'll find everything you need in the Appraisal and Check in Portlet.

There are links to guidance to support meaningful conversations.

Click on **Recording Appraisal and Check in** to get started.

In Progress Completed Performance

Main Appraiser Reviewer and Participant

Appraisals and Reviews As Main Appraiser

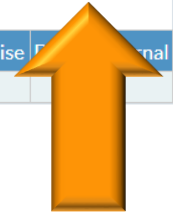
[View Appraisals and Reviews in People Hierarchy](#)

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

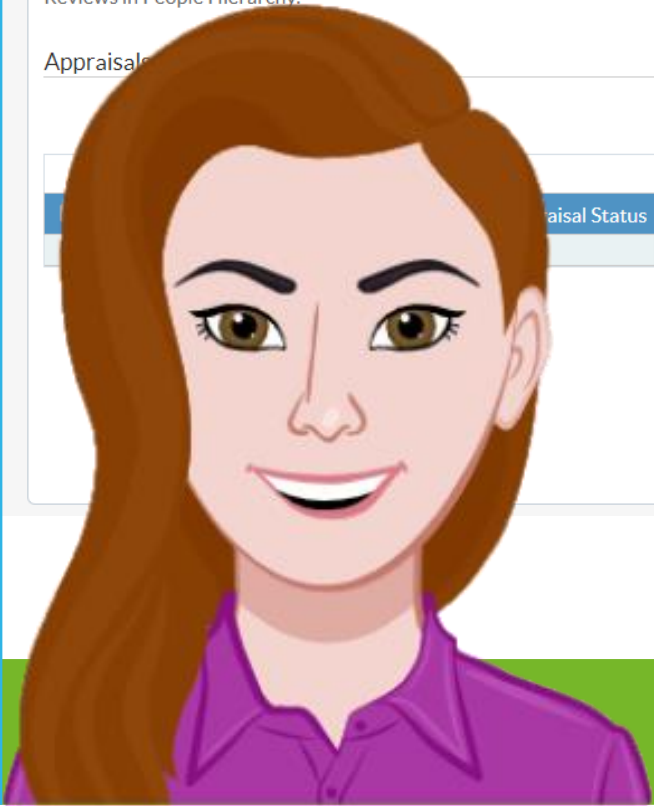
Appraisals

Create Standard Appraisal Go

Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status	Upload	Print	Details	Appraise	Final



Click on **Go**.






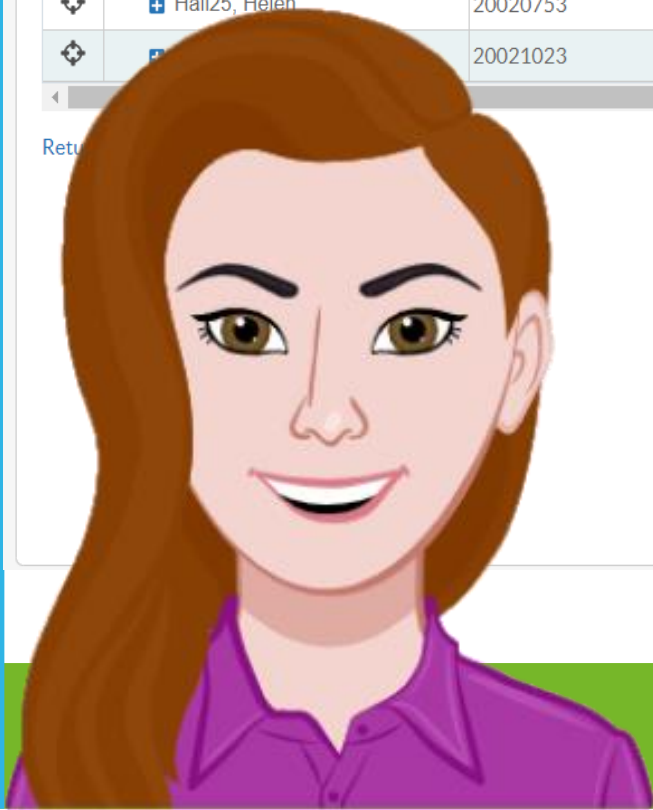
Name Go [Advanced Search](#) [My List](#)

In Progress: Main Appraiser >

Create Standard Appraisal: People in Hierarchy

TIP Click the action button next to the employee you wish to action. Click the details button for more information about the employee.

Focus	Name	Assignment Number	Job	Organisation	Action	Details
	Manager25, Michelle					
	Hall25, Helen	20020753	Nursing and Midwifery Registered Midwife - Manager	517 Midwifery Nurse Management		
		20021023	Nursing and Midwifery Registered Modern Matron	517 Ward 9		



Pick the relevant member of staff.

Create Standard Appraisal: Setup Details

Cancel Save and Close Add Details

Step 1 of 2

Employee Name Hall25, Helen
Employee Number 20020753

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

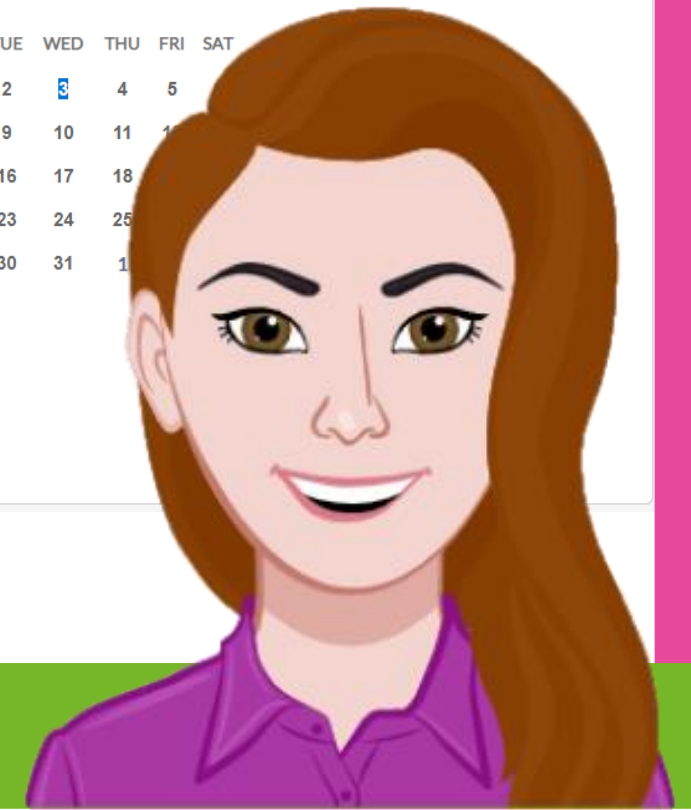
- * Review Type: Review
- * Period Start Date: 01-May-2022
- * Period End Date: 30-Apr-2023
- * Template: 408%
- * Meeting Date: 03-May-2023
- Next Meeting Date:
- Assignment Number: 20020753
- * Main Reviewer: Manager25, Michelle

May 2023

SUN	MON	TUE	WED	THU	FRI	SAT
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Now it's time to enter the details.

In Review Type, enter **Review**.



Create Standard Appraisal: Setup Details

Cancel Save and Close Add Details

Step 1 of 2

Employee Name Hall25, Helen
Employee Number 20020753

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

* Review Type

* Period Start Date

* Period End Date

* Template

* Meeting Date

Next Meeting Date

Assignment Number

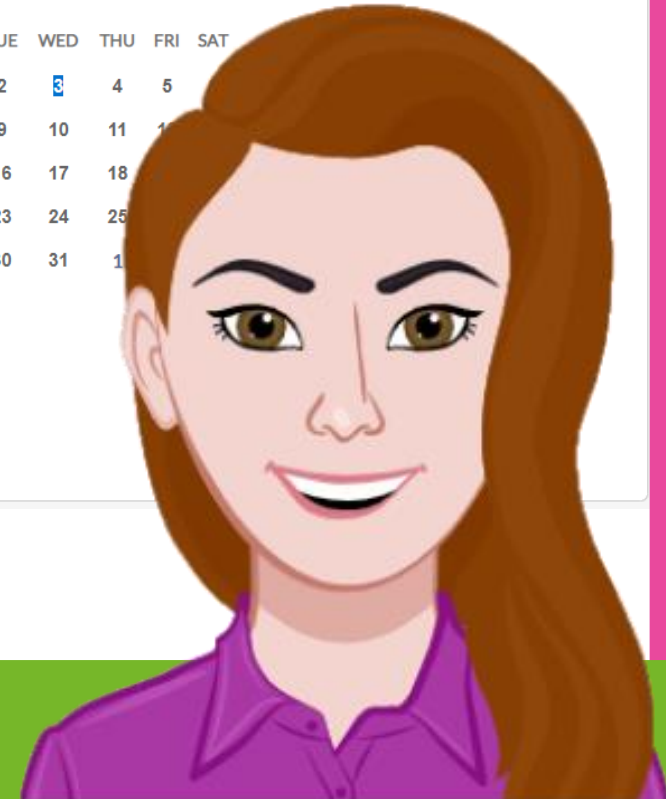
* Main Reviewer

May 2023

SUN	MON	TUE	WED	THU	FRI	SAT
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Enter the dates of the period being reviewed. The dates you enter here will always be in the past, the 'review period'.

This will be the previous 12 months for an Appraisal or it will be 3 months for a Check In.



Create Standard Appraisal: Setup Details

Cancel Save and Close Add Details

Step 1 of 2

Employee Name Hall25, Helen
Employee Number 20020753

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

* Review Type

* Period Start Date

* Period End Date

* Template

* Meeting Date

Next Meeting Date

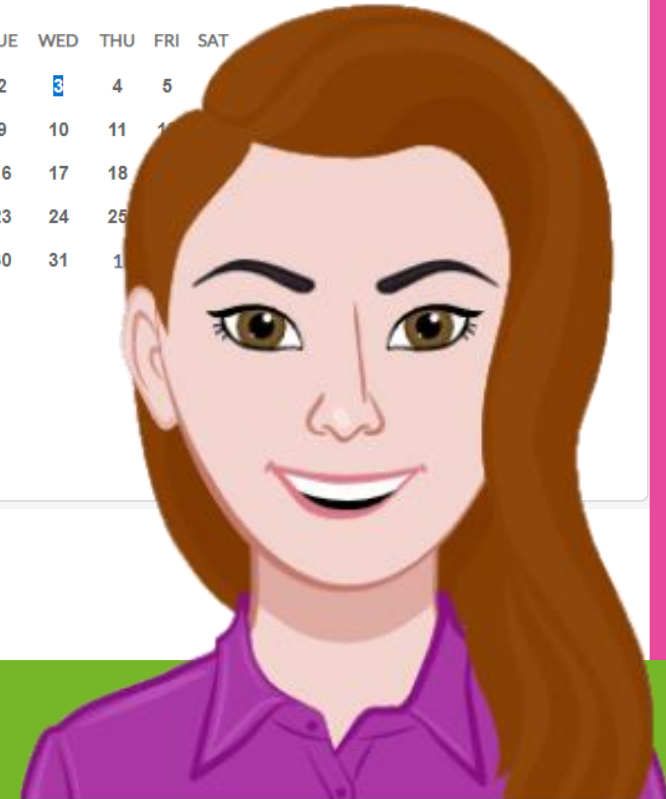
Assignment Number

* Main Reviewer

May 2023

SUN	MON	TUE	WED	THU	FRI	SAT
30	1	2	3	4	5	
7	8	9	10	11	12	
14	15	16	17	18	19	
21	22	23	24	25	26	
28	29	30	31	1	2	

In the template field, search for **408%**



Create Standard Appraisal: Setup Details

Step 1 of 2

Employee Name **Hall25, Helen**
 Employee Number **20020753**

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
 * Indicates required field

- * Review Type
- * Period Start Date
- * Period End Date
- * Template
- * Meeting Date
- Next Meeting Date
- Assignment Number
- * Main Reviewer

Search and Select: Template

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

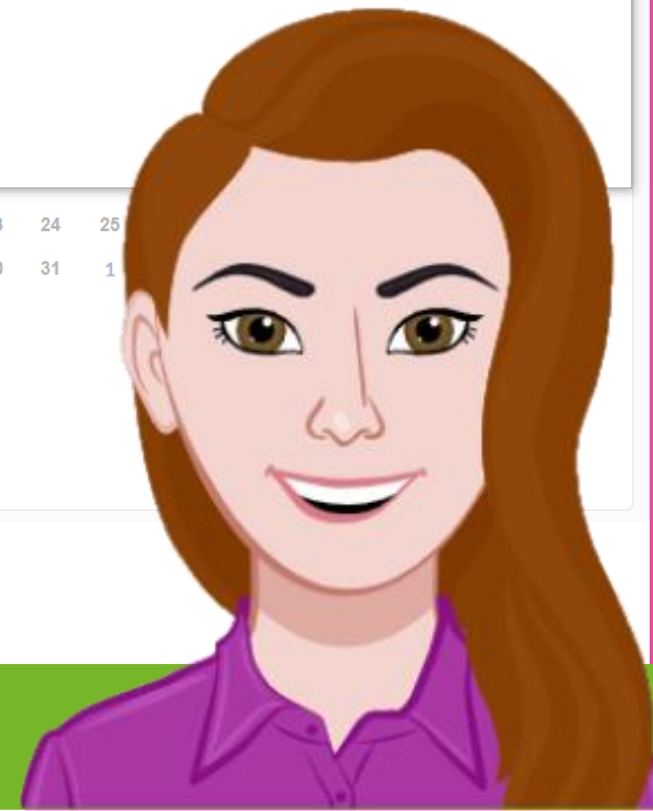
Search By

Results

Select	Quick Select	Appraisal Template	Date From	Date To	Questionnaire Name	Competency Template	Objective Template	Description
<input type="radio"/>		408 Appraisal	01-Jan-2000					
<input type="radio"/>		408 Check In	01-Jan-2000					

21 22 23 24 25
 28 29 30 31 1

Choose the template based on the meeting that has taken place.



Create Standard Appraisal: Setup Details

Cancel Save and Close Add Details

Step 1 of 2

Employee Name Hall25, Helen
Employee Number 20020753

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

- * Review Type
- * Period Start Date (19-Apr-2023)
- * Period End Date
- * Template
- * Meeting Date
- Next Meeting Date
- Assignment Number
- * Main Reviewer

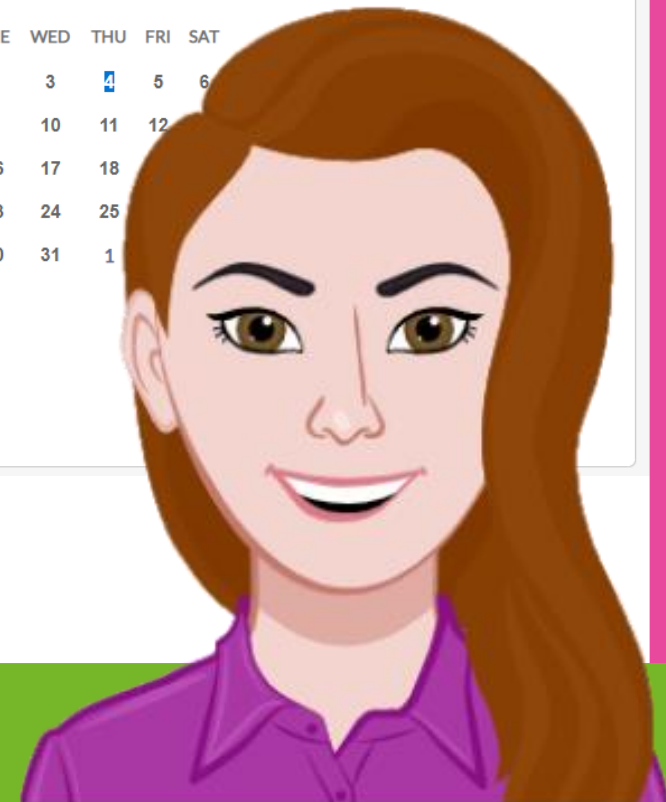
May 2023

SUN	MON	TUE	WED	THU	FRI	SAT
30	1	2	3	4	5	6
7	8	9	10	11	12	
14	15	16	17	18		
21	22	23	24	25		
28	29	30	31	1		

Enter the date the Appraisal or Check In took place.

If you enter the next meeting date, the Reviewee will receive a reminder notification.

The notifications are sent 3 months and 1 month before the Next Meeting Date.



Create Standard Appraisal: Setup Details

Step 1 of 2

Cancel Save and Close **Add Details**

Employee Name Hall25, Helen
Employee Number 20020753

Setup Details

TIP You cannot change the appraisal template or the assignment after clicking Next.
* Indicates required field

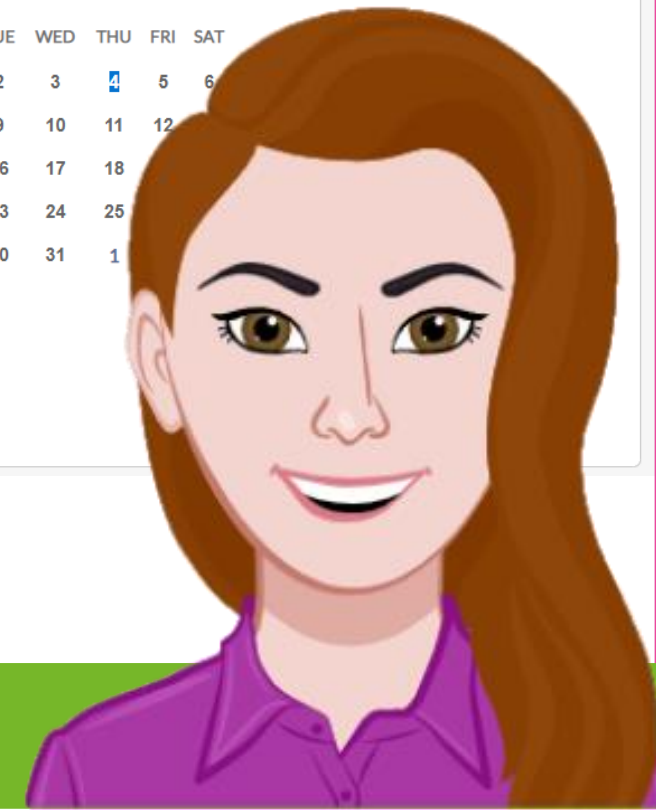
- * Review Type: Review
- * Period Start Date: 01-May-2022
- * Period End Date: 30-Apr-2023
- * Template: 408 Appraisal
- * Meeting Date: 03-May-2023
- Next Meeting Date: 01-Sep-2023
- Assignment Number: 20020753
- * Main Reviewer: Manager25, Michelle

May 2023

SUN	MON	TUE	WED	THU	FRI	SAT
30	1	2	3	4	5	6
7	8	9	10	11	12	
14	15	16	17	18		
21	22	23	24	25		
28	29	30	31	1		



Once the information is complete, click **Add Details.**



Progress through gateway Participants Additional Appraisal Details

Create Standard Appraisal: Overview

Save and Close Back Save and Proceed

Progress through gateway Participants Additional Appraisal Details

Step 2 of 2

Employee Name Hall25, Helen
Employee Number 20020753
Supervisor Manager25, Michelle

Organisation 517 Midwifery Nurse Management
Job Nursing and Midwifery Registered|Midwife



Progress through gateway

All Comments

Text area for comments

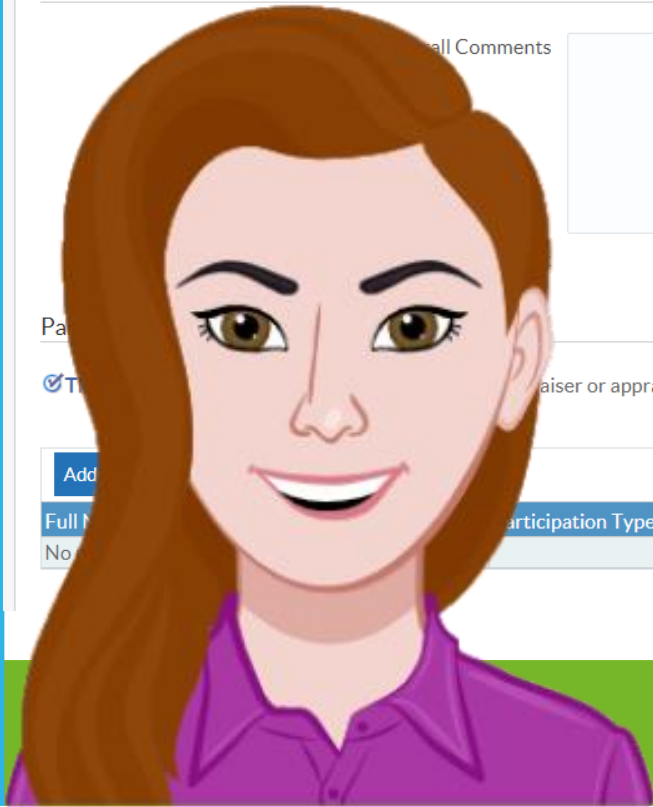
Pa

Return to Top

raiser or appraiser who contributes to the appraisal.

Add

Full Name	Participation Type	Questionnaire Name	Update	D
No				



Click Save and Proceed.

Details: Main Appraiser >

Main Appraiser Review

[Share With Appraisee](#) [Update Appraisal](#) [Complete Appraisal](#)

Employee Name **Hall25, Helen**
Employee Number **20020753**
Job **Nursing and Midwifery Registered|Midwife - Manager**

Organisation **517 Midwifery Nurse Management**
Organization Email Address
Supervisor **Manager25, Michelle**



[Change Main Appraiser](#)

Setup Details

Initiator **Manager25, Michelle**
Appraisal Purpose **Review**
Period Start Date **01-May-2022**
Period End Date **30-Apr-2023**
Template **408 Appraisal**

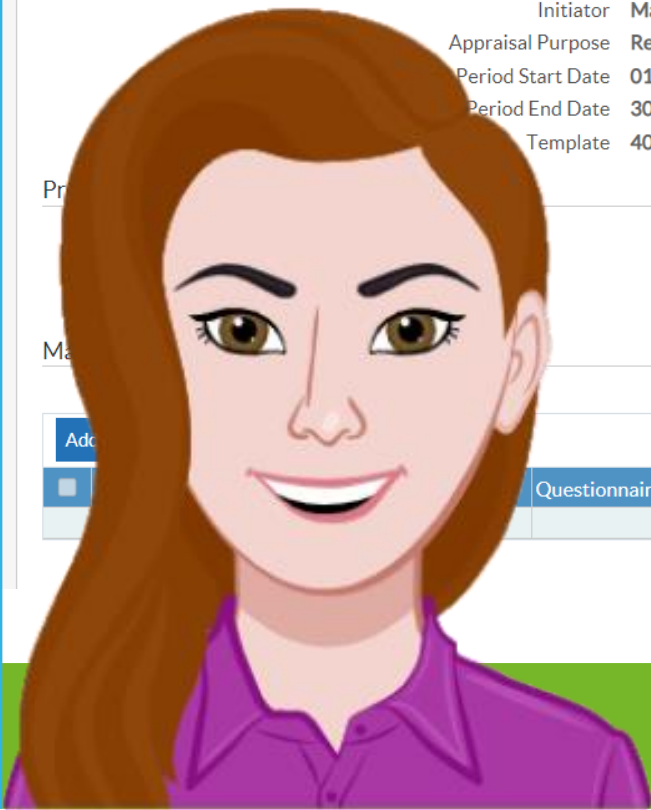
Main Appraiser **Manager25, Michelle**
Appraisal Date **03-May-2023**
Next Appraisal Date **01-Sep-2023**

Overall Comments
Appraisee Feedback

Ma

Ad

Questionnaire Name	Participation Status	Last Notified Date	Date Completed	Comments	Update	De



Click Complete Appraisal.

Don't worry, it's the same button if you've completed a Check In.

Give Final Ratings: Main Appraiser

Cancel Save as Draft **Continue**

Employee Name **Hall25, Helen**
Employee Number **20020753**
Job **Nursing and Midwifery Registered|Midwife - Manager**

Organisation **517 Midwifery Nurse Management**
Organization Email Address
Supervisor **Manager25, Michelle**



Progress through gateway

Overall Comments


back

Ac

De

Se

ee when the appraisal is complete.

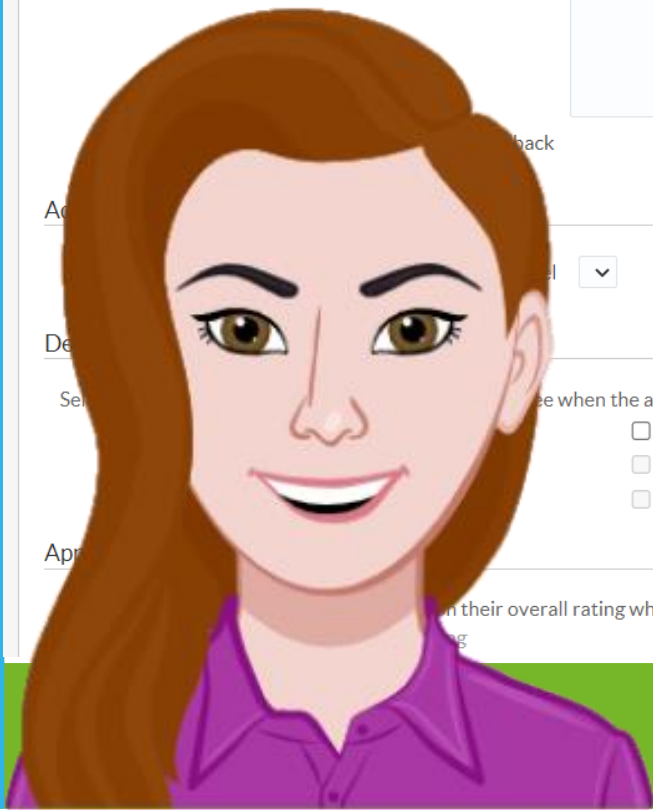
- Additional Details 
- Participant Names
- Participant Ratings

- O
-
-

Apr

on their overall rating when the appraisal is complete.

Click Continue.



Give Final Ratings: Main Appraiser >

Give Final Ratings: Review

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

[Cancel](#) [Printable Page](#) [Back](#) [Submit](#)

Employee Name **Hall25, Helen**
Employee Number **20020753**
Supervisor **Manager25, Michelle**


Organisation **517 Midwifery Nurse Management**
Job **Nursing and Midwifery Registered|Midwife - Ma**



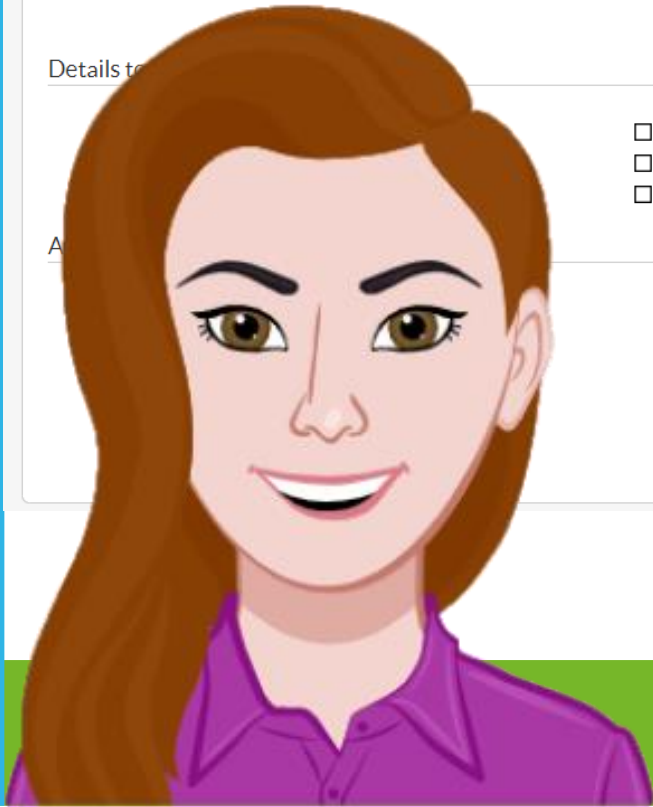
Progress through gateway

Overall Comments
Appraisee Feedback

Details to

- Additional Details 
- Participant Names
- Participant Ratings

- Overall Rating
- Overall Comments
- Participant Comments



Click Submit.

Give Final Ratings: Review

Cancel Printable Page Back Submit

To make changes to the appraisal, click Back. To complete the appraisal, click Submit.

Employee Name Hall25, Helen
Employee Number 20020753
Supervisor Manager25, Michelle

Organisation 517 Midwifery Nurse Management
Job Nursing and Midwifery Registered|Midwife - Manager

Progress through gateway

Overall Comments

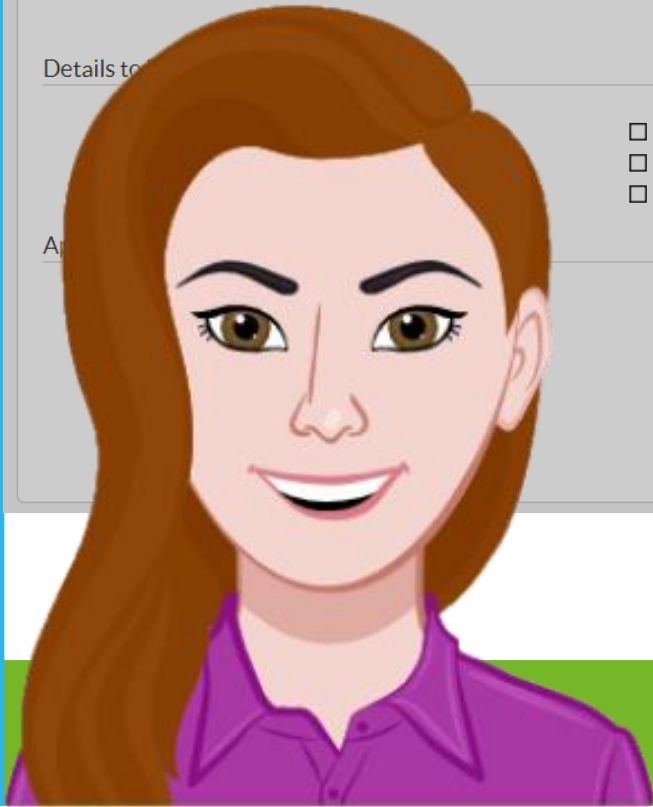
Warning
 You have chosen to complete this appraisal.
 You cannot update a completed appraisal. Do you want to continue?

No Yes

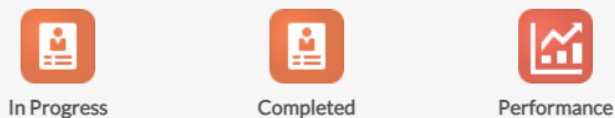
Details to

- A
- P
- P

- Overall Rating
- Overall Comments
- Participant Comments



Click **Yes** to confirm you want to complete the Appraisal or Check In.



Main Appraiser Reviewer and Participant

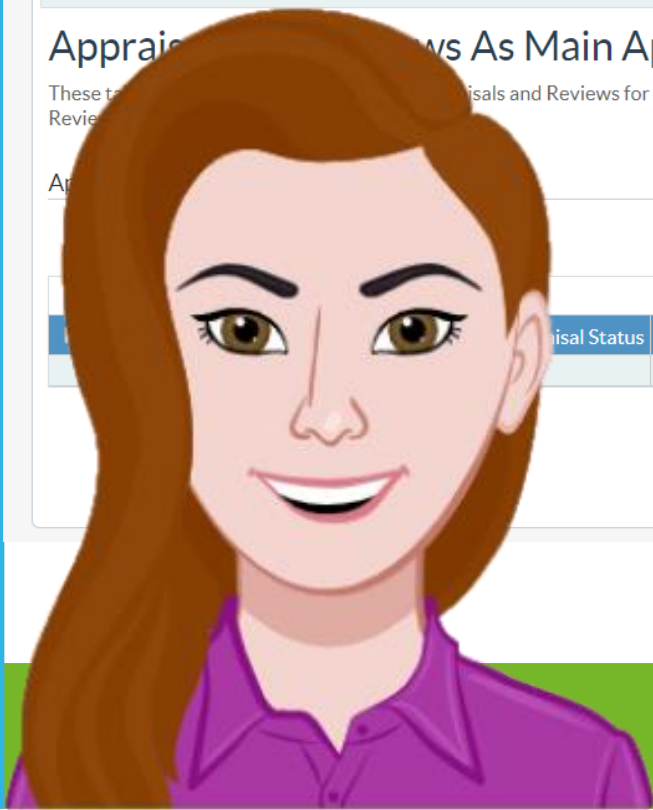
Confirmation
The appraisal is complete.

Appraisals As Main Appraiser

[View Appraisals and Reviews in People Hierarchy](#)

These table shows Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser) click on the 'View Appraisals and Reviews in People Hierarchy' link.

Appraisal Status	Appraisal Purpose	Plan	Participation Status	Period Start Date	Period End Date	Download	Select a File	Clear Offline Status



You'll see a confirmation message that the Appraisal or Check In is complete.

Click on the orange **Completed** icon.



In Progress



Completed



Performance

Main Appraiser Reviewer and Participant

Confirmation
The appraisal is complete.

Appraisals and Reviews As Main Appraiser

[View Appraisals and Reviews in People Hierarchy](#)

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

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g any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Last Name, Title, First Name

(18-Apr-2023)



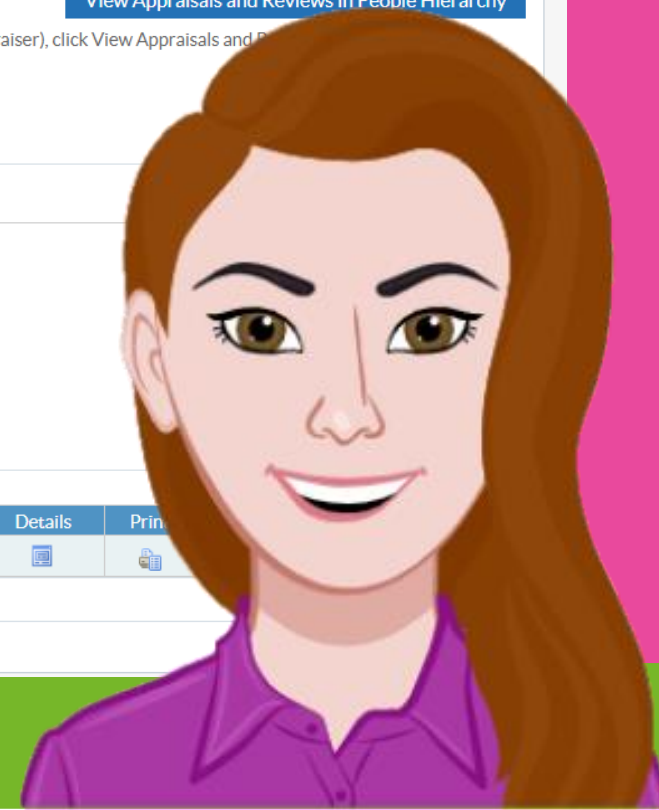
Go

Clear

te ^	Appraisal Purpose ^	Plan ^	Period Start Date ^	Period End Date ^	Details	Print
3	Review		01-May-2022	30-Apr-2023		

You can access all your completed Appraisals and Check Ins.

They'll all be listed here.





In Progress



Completed



Performance

Main Appraiser Reviewer and Participant

Confirmation
The appraisal is complete.

Appraisals and Reviews As Main Appraiser

[View Appraisals and Reviews in People Hierarchy](#)

These tabs list in progress and completed Appraisals and Reviews for which you are the Main Appraiser. To see Appraisals and Reviews for people in your people hierarchy (for which you may not be the Main Appraiser), click View Appraisals and Reviews in People Hierarchy.

The Reviewer can see them for as long as that member of staff is in their team.

The Reviewee can see them for as long as they are an employee of the Trust

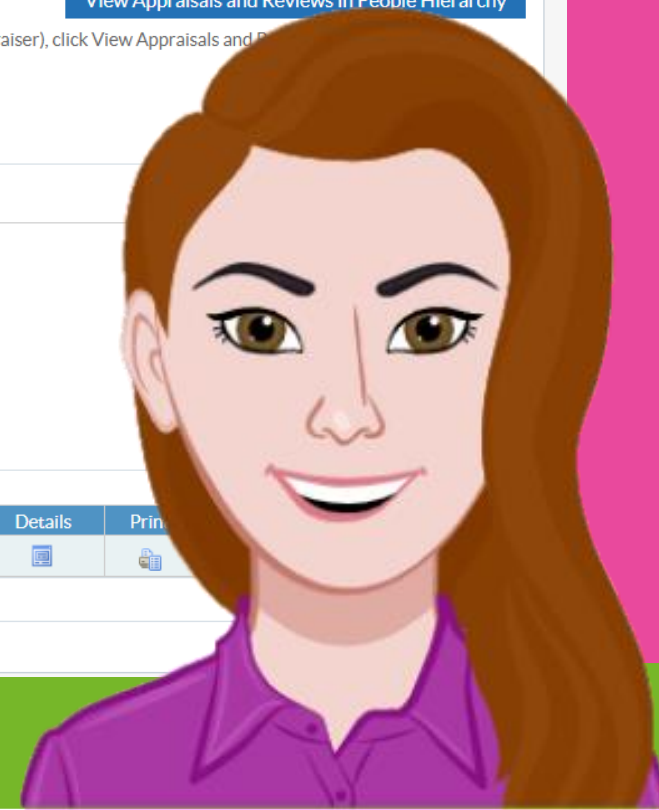
Filter by any combination of Appraisee, Appraisal Date, and Appraisal Purpose.

Last Name, Title, First Name

(18-Apr-2023)

Go Clear

Appraiser	Appraisal Purpose	Plan	Period Start Date	Period End Date	Details	Print
3	Review		01-May-2022	30-Apr-2023		

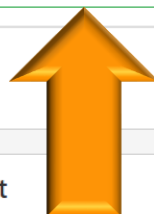


Appraisals & Check In's



[Appraisal and Check In Supporting Guidance](#)

[Appraisal and Check In Evaluation](#)



My Compliance

Assignments:

All - Assignments

Percentage Compliance: 0%



My Class Search

Search Courses

17/08/2023



Go

My Bank Account Details

[View Details](#)

Please expand to view your bank account details. Select 'Update My Bank Details' to amend your details.

My Annual

Assignments

2

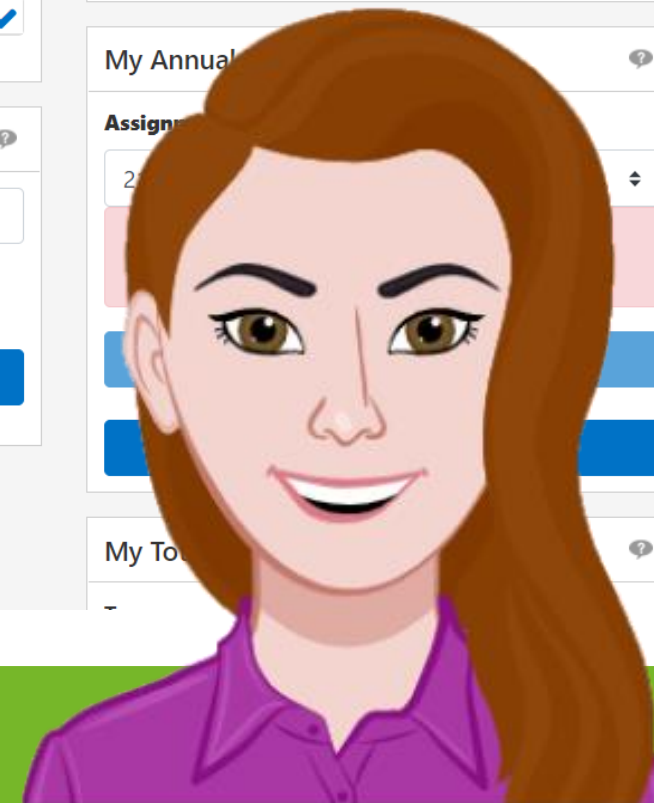
My Employment

Don't forget!
Remind the Reviewee
to complete their
**Appraisal or Check In
Evaluation!**

We want to ensure
that people's
experience of
Appraisal and Check
In meetings are
valuable.

Feedback is
anonymous.

At WUTH we each
have a voice that
counts.



your
appraisal

your
check in

Organisational Development Team

wuth.learninganddevelopment@nhs.net



If you need any
assistance, contact...